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**Calendar  
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**CureMD UC'24**  
Raleigh, North Carolina  
**Connecting Cure Communities**



Calendar

Management:

Optimizing Your Patient  
Scheduling

Julie Fields





# Strategies for Efficient Scheduling and Improved Patient Flow

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## **Introduction:**

### **Session Agenda**

- Understanding the importance of effective calendar management
- Managing Schedule Adjustments
- Editing Templates
- Reduction in No-Shows
- Improve Patient Flow
- How optimizing scheduling can improve practice efficiency

Is your clinic managing the scheduler?

Let's discuss some reasons why it's important to effectively manage your scheduler!



# Why is Managing the Schedule so Important!

## Patient Experience:

- Efficient scheduling can improve patient satisfaction and experience.

## Patient Care:

- Effective time management can help healthcare professionals provide better care to patients.

## Staff Productivity

- Effective scheduling can help ensure that staff workloads are balanced, and that the clinic is operating efficiently.

## Triage:

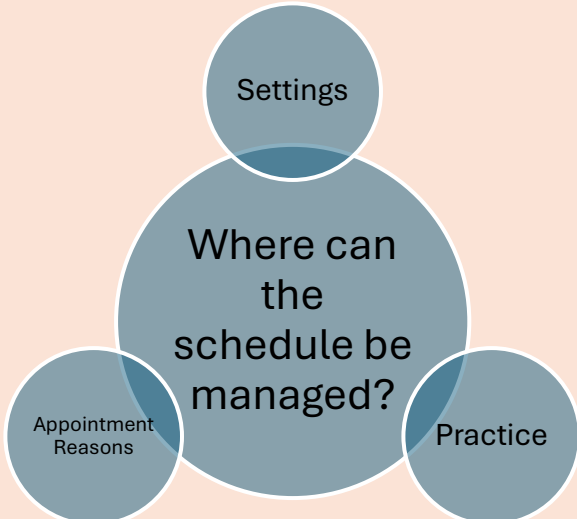
- Real-time scheduling can help ensure that patients with different levels of urgency are appropriately prioritized.

## Personal and professional calendars:

- It's important to manage both personal and professional calendars to avoid overbooking or understaffing the office.

# How and Where Can Schedule Adjustments Be Managed?

## Appointment Reasons



Settings - Appt. Reason

Appointment Reason

Search [ ] Add Print

Name [ ] Description [ ]

| Reason   | Description | Speciality                              | Log |
|--|-------------|---|-----|
| <input type="checkbox"/> CD                          |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> CMD Provider Notes          |             |   | [ ] |
| <input type="checkbox"/> FP Annual                   |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> FP Eval-Follow Up           |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> FP LARC Insertion           |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> FP LARC removal             |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> FP LARC Removal-Insertion   |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> FP New Consult              |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> FP Postpartum               |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> FP Supply                   |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> Immunizations               |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> MH 3 Hour Glucose-Lab Visit |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> MH New OB Nurse             |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> MH New OB Provider          |             | Allergy & Immunology, Anesthesiology... | [ ] |
| <input type="checkbox"/> MH Return Visit             |             | Allergy & Immunology, Anesthesiology... | [ ] |

Showing 1 to 15 of 29 entries

Page 1 of 2 Next Last

# Pop Quiz

What Role Type must a User have to Setup or Modify Calendars from Settings?

MDADMIN!

Are Appointment Reasons Reportable?

YES!

Can a Note Template be Attached to an Appointment Reason?

YES!

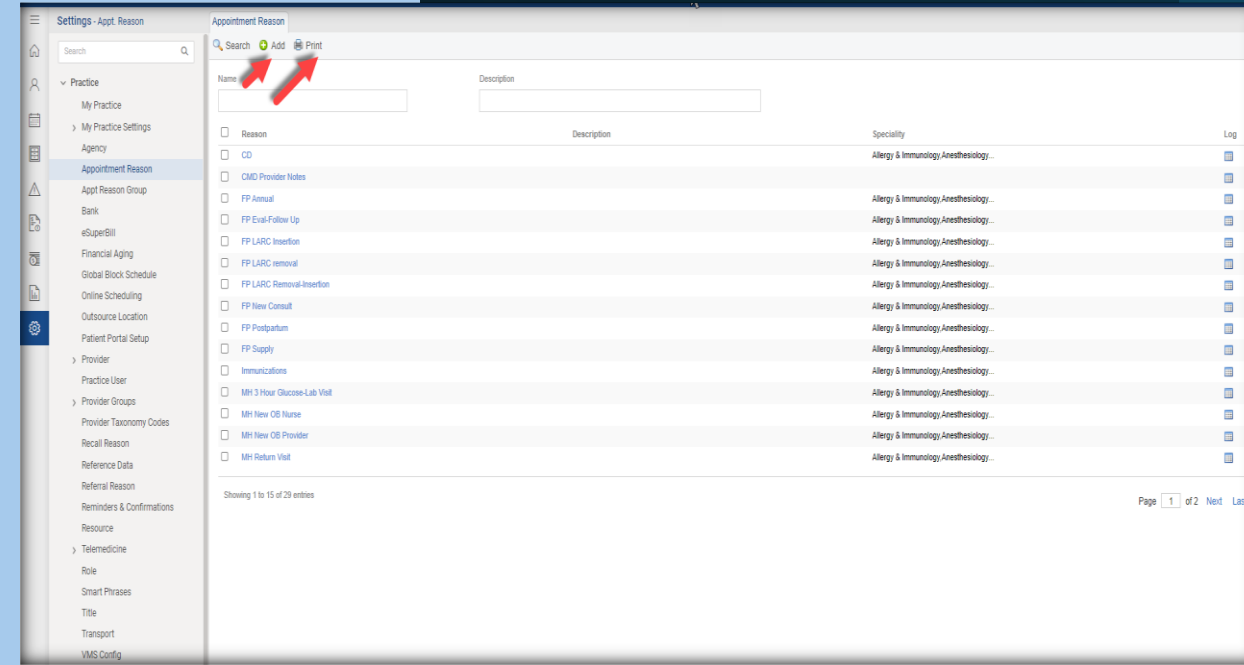




# Calendar Adjustment-Appointment Reasons

## Things to know when modifying Appointment Reasons!

- Print a hard-copy prior to making modifications.
- Add a New Reason(s)
- Update the Name of an Existing Appointment Reason
- Note Template-



Appointment Reason List [Edit](#)

[Save](#) [Print](#) [Delete](#)

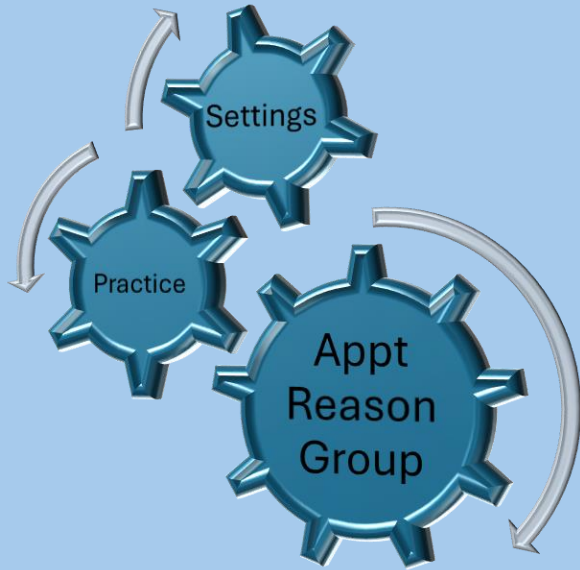
Reason \*  
Mental Health Initial 1st  Display in Patient Portal  Telemedicine  Digital-CheckIn

Duration: 1 Hr.   
Patients/Day: 2  
Patients/Hour: 2

Description

Note Template  
MENTAL HEALTH INTAKE 90791

# Managing Schedule Adjustments



The screenshot shows a software interface for managing appointment reason groups. On the left is a navigation sidebar with a search bar and a list of settings categories. The 'Appt Reason Group' category is selected and highlighted in blue. A red circle with the number '1' is next to the gear icon in the sidebar. A red circle with the number '2' is next to 'My Practice', and a red circle with the number '3' is next to 'Appt Reason Group'. The main content area is titled 'Appointment Reason Group' and features an 'Add' button, a search bar, and a list of appointment groups with their durations. A mouse cursor is visible over the 'Add' button.

| Group           | Duration |
|-----------------|----------|
| HD Provider     | 15 min   |
| HD Provider     | 30 min   |
| Maternal Health | 15 min   |
| Maternal Health | 30 min   |
| Nurse           | 15 min   |
| Nurse           | 30 min   |
| Nurse           | 60 min   |
| Nurse           | GTT      |

# Pop Quiz

Can Reason Groups be Color-Coded?

YES



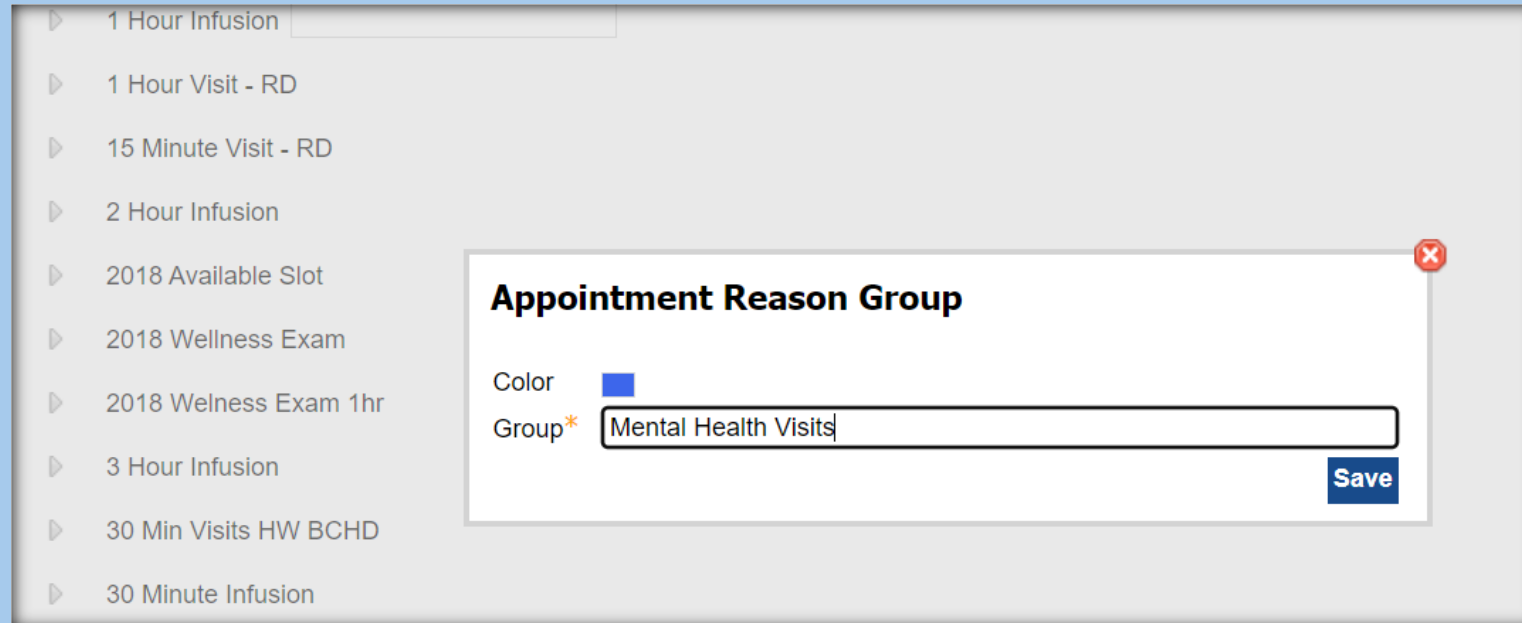
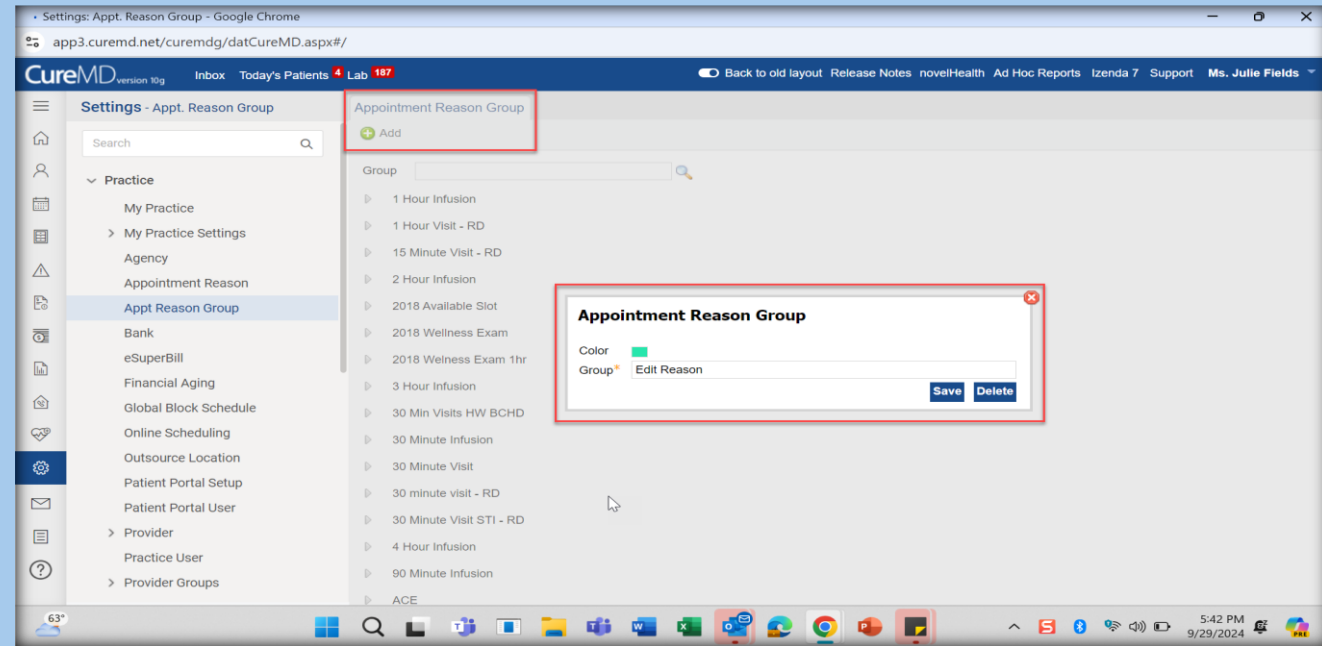
# Calendar Adjustment-Reason Groups

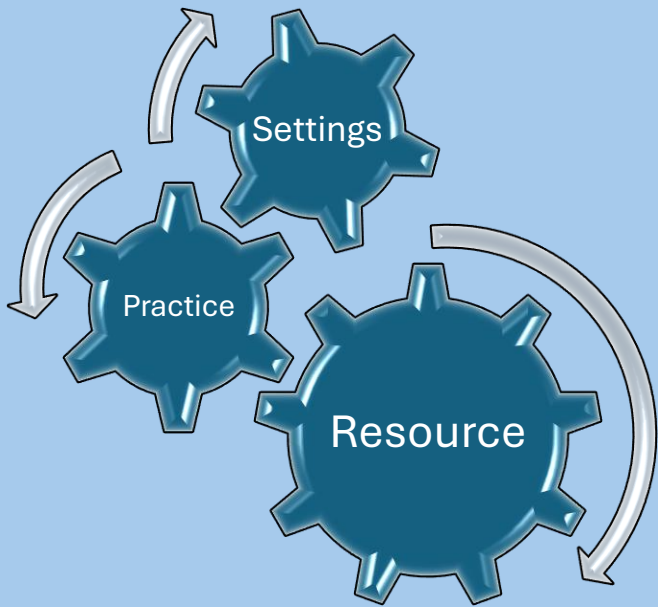
## Things to know when modifying an Appointment Reason Group



What can be updated or modified?

- Add a New Appointment Reason
- Remove an Appointment Reason **out** of a Group
- Edit the Group Name
- Add an Appointment Reasons to a Group
- **Color** Coded!
- Add or Update a **Color**!





# Editing Schedule Templates

**Settings - Resource**

Search

Practice **2**

- My Practice
- My Practice Settings
- Agency
- Appointment Reason
- Appt Reason Group
- Bank
- eSuperBill
- Financial Aging
- Global Block Schedule
- Online Scheduling
- Outsource Location
- Patient Portal Setup
- Patient Portal User
- Provider
- Practice User
- Provider Groups
- Provider Taxonomy Codes
- Recall Reason
- Reference Data
- Reminders & Confirmations
- Resource**

**1**

### CureMD Version 10g Settings

CureMD's settings module provides you with the ability to comprehensively customize your application enabling you to make the most of your software. To learn more about how you can customize your solution, please contact the CureMD support team at [support@curemd.com](mailto:support@curemd.com) or call (718) 684-9298.

**Practice**  
Manage business locations, providers, users, clearing houses, appointment reasons and schedules

**Billing**  
Manage insurance plans, fee schedules, procedures, diagnosis and modifiers

**EHR**  
Create and manage custom lists and libraries for allergies, complaints, medications, physical exams, review of systems, flow sheets, pharmacies, patient education, laboratories, medical tests and vaccinations.

**Reports**  
Manage report formats and headers including superbills, patient statements, letter templates and forms for HCFA and NF3

**Warning:** Changing application settings without proper training can cause undesired results

**3**

# Edit Schedule/Calendar Templates

What actions can be taken?

## Add a New Schedule

Resource

Search **+ Add** Delete

Resource Name:  Short Name:  Resource Provider: (All) Speciality: (All)

Scheduled Location: (All) Status: (All)

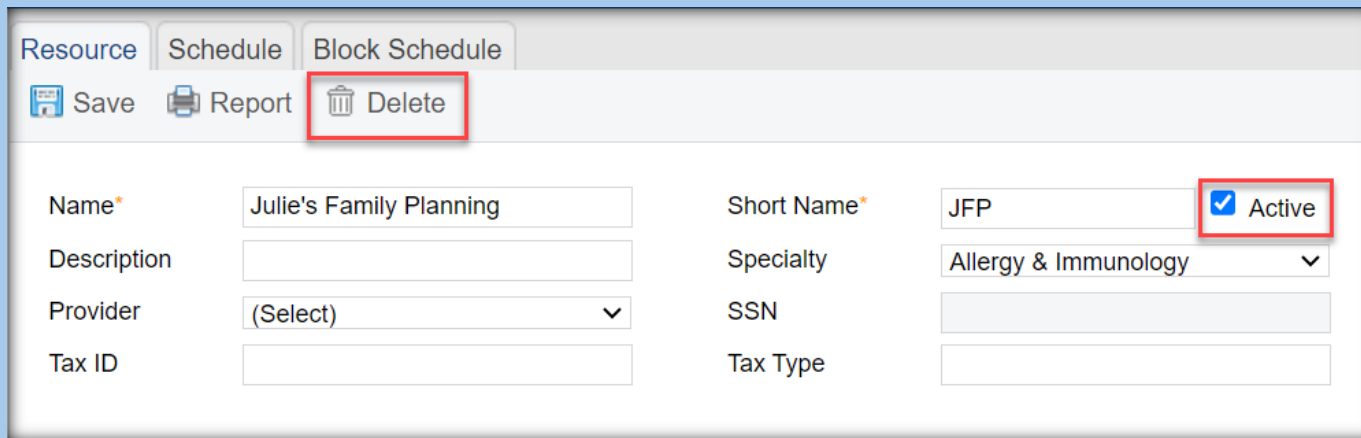
| <input type="checkbox"/> Resource Name                 | Description                     | Resource Provider  | Speciality                         | Scheduled Location                          | Status |
|--|---------------------------------|--------------------|------------------------------------|---|--------|
| <input type="checkbox"/> 2025 Tester                   |                                 | Exam, New Employee | Methadone Maintenance Treatment... | Florida Atlantic University                 | Active |
| <input type="checkbox"/> Adult Health Clinic           | North Carolina Public Health... |                    | Public Health                      | Ambulatory Surgery, Audiology Exam, Balt... | Active |
| <input type="checkbox"/> Adult Immunizations           | Covid Flu                       |                    | Internal Medicine                  | Audiology Exam                              | Active |
| <input type="checkbox"/> Adult Immunizations - R...    |                                 |                    | Allergy & Immunology               | Mecklenburg Co Health Dept                  | Active |
| <input type="checkbox"/> Autism Schedule               |                                 |                    | Allergy & Immunology               | Ambulatory Surgery, Gaffney, Prescott - ... | Active |
| <input type="checkbox"/> Basic Wellness Center         |                                 |                    | Internal Medicine                  | Audiology Exam                              | Active |
| <input type="checkbox"/> Behavioral Health Clinic i... |                                 |                    | Allergy & Immunology               | CureMD Demo Center                          | Active |
| <input type="checkbox"/> Breast Screening              |                                 |                    | Allergy & Immunology               | CureMD Demo Center                          | Active |



# Edit Schedule/Calendar Templates

What can be changed?

- Inactivate a Schedule
- Delete a selected schedule



Resource Schedule Block Schedule

Save Report Delete

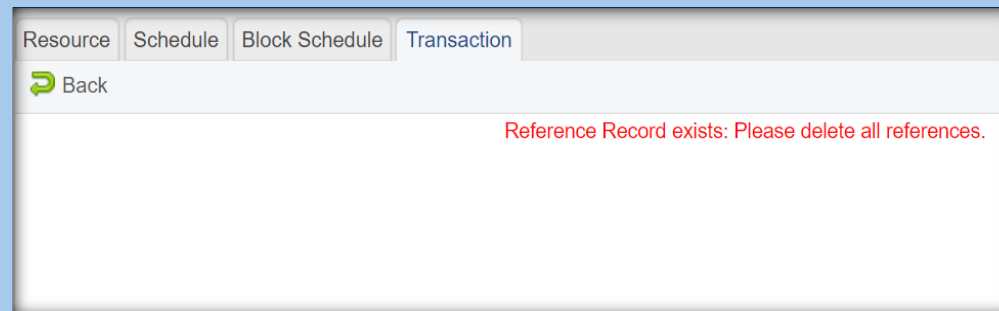
Name\* Julie's Family Planning Short Name\* JFP  Active

Description Specialty Allergy & Immunology

Provider (Select) SSN

Tax ID Tax Type

Delete is only permitted if there are no patient appointments or blocks applied to the that specific schedule.



Resource Schedule Block Schedule Transaction

Back

Reference Record exists: Please delete all references.



# Edit Schedule/Calendar Templates

What can be changed?

- Edit a Current Schedule Name
- Modify the Slot Minutes
- Update Block Name
- Add Reason Group
- Copy a Schedule (Save As)

The screenshot shows the 'Settings - Resource' page in the CureMD application. The 'Calendar' tab is active, displaying the configuration for 'Julie's Family Planning'. The page includes a sidebar with navigation options, a main form for editing the calendar, and a table of reason groups. Red boxes highlight the 'Save As' button, the 'Name' field, the 'Slot' dropdown, the 'Lunch' block, and the 'Reason Groups' table.

**Calendar Settings:**

- Name: Monday thur Friday 2024
- Location: Raleigh Health Center
- Date: 09/01/2024 to 11/30/2024
- Start Time: 08:00 AM
- End Time: 06:00 PM
- Slot: 30 minutes
- Block: Lunch (01:00 PM to 01:30 PM)

**Reason Groups Table:**

| Reason Group                     | Start Time | End Time | Duration | Action |
|----------------------------------|------------|----------|----------|--------|
| Family Planning 30 Mintues       | 08:00 AM   | 09:00 AM | 60 mins  | Delete |
| Family Planning 30min            | 09:00 AM   | 10:00 AM | 60 mins  | Delete |
| Family Planning NP               | 10:00 AM   | 11:00 AM | 60 mins  | Delete |
| Family Planning Follow Up Visits | 11:00 AM   | 11:30 AM | 30 mins  | Delete |
| Family Planning Follow Up Visits | 11:30 AM   | 12:00 PM | 30 mins  | Delete |

**Repeat Settings:**

- Frequency: Weekly
- Every: 1 Week(s)
- Days: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday



# Edit Schedule/Calendar Templates

## BLOCKS

- Add New Blocks
- Block can be edited
- Name
- Date
- Time

The screenshot shows the 'Block Schedule' page in the CureMD system. The page title is 'Block Schedule' and it includes a search bar and a list of navigation items: 'Save', 'Delete', 'Affected Appointments', 'Report', and 'Back'. The main content area is titled 'Julie's Family Planning' and contains the following fields:

- Name\***: Office Meeting
- Location**: Raleigh Health Center
- Date\***: 09/02/2024 to 09/02/2024
- Start Time\***: 08:00 AM
- End Time\***: 06:00 PM

The 'Repeat' section includes the following options:

- Daily
- Weekly
- Monthly
- Every Day
- Every Other Day
- Every Week Day
- Every 1 Days(s)

The left sidebar shows the 'Settings - Resource' menu with the 'Resource' section highlighted. The top navigation bar includes 'CureMD version 10g', 'Inbox', 'Today's Patients 2', 'Lab 185', and 'Back to old layout Release Notes'.

# Edit Schedule/Calendar Templates

## GLOBAL BLOCKS

- Add Recurring Blocks
- Add Holiday Blocks

Settings - Global Block

Search

Practice

2 My Practice

- > My Practice Settings
  - Agency
  - Appointment Reason
  - Appt Reason Group
  - Bank
  - eSuperBill
  - Financial Aging

3 Global Block Schedule

  - Online Scheduling
  - Outsource Location
  - Patient Portal Setup
  - Patient Portal User

> Provider

  - Practice User

> Provider Groups

  - Provider Taxonomy Codes
  - Recall Reason
  - Reference Data
  - Reminders & Confirmations
  - Resource

> Telemedicine

  - Role

Save

Recurring Block  Holiday Block

Reason: Meeting

Location: Raleigh Health Center

Period: 10/01/2024 to 12/31/2024

Start Time: 09:00 AM

End Time: 09:00 AM

**Pattern**

Daily

Weekly

Monthly

Day 1 of every 1 month(s)

The 1st of every 1 month(s) Monday

# Pop Quiz

Only MDADMINS can modify the Calendar from the Scheduler?

False. Any user with the proper permissions can modify the Calendar setup from the Scheduler.

Can Appointment Reasons be Added, Modified and Deleted from the Scheduler?

No. This can only be added and modified under Settings.



# Managing Schedule Adjustments

## Update Today's Calendar With Proper Permissions

Change details for a specific  
schedule

- Reason
- Duration
- Start and End (Not Recommended if Patient's)
- Add or Delete Reason Groups

Update Calendar: Julie's Family Planning 09/15/2024 - Google Chrome

app3.curemd.net/curemdg/ADTNew/webpages/CalPartialChange.aspx?ResourceID=241&ProviderID=0...

Save

Calendar List for Julie's Family Planning at Raleigh Health Center

| Calendar           | Start      | End        | From     | To       | Duration |
|--------------------|------------|------------|----------|----------|----------|
| Monday thur Friday | 09/01/2024 | 09/16/2024 | 08:00 AM | 03:00 PM | 15       |

Change details for Monday thur Friday on 09/15/2024

Reason\* Manage RG - Delete Duration 15

Start 8 00 AM End 6 00 PM

Reason Groups

Add New

| Reason Group                     | Start Time | Duration | Appointment |
|----------------------------------|------------|----------|-------------|
| Family Planning 30min            | 09:00 AM   | 60       | X           |
| Family Planning NP               | 10:00 AM   | 60       | X           |
| Family Planning Follow Up Visits | 11:00 AM   | 30       | X           |
| Family Planning Follow Up Visits | 11:30 AM   | 30       | X           |

# Manage Schedule Adjustment

## Edit Schedule/Calendar Templates from the Scheduler

What can be changed?

- Edit a Current Schedule Name
- Modify the Slot Minutes
- Update Block Name
- Add/Delete Reason Group(s)
- Copy a Schedule (Save As)

Multiple | Status | Manage Reason Group

Summary | Block | Update Today's Calendar | Add/Update Calendar | Print

Scheduler: Calendar List Julie's Family Planning 09/15/2024

Calendar List | Calendar

Save | Save As | Delete

Standard

Julie's Family Planning Capacity/day: 14 (Blocks excluded) Vaccination Calendar

Name\* Monday thur Friday 2024 Location Raleigh Health Center

Date\* 09/01/2024 to 09/16/2024 Start Time\* 08:00 AM End Time\* 03:00 PM

Slot 30 minutes

Block\* Lunch Start Time 01:00 PM End Time 01:30 PM

+ Reason Groups

|                                  |                     |         |    |
|----------------------------------|---------------------|---------|----|
| Family Planning 30 Mintues       | 08:00 AM - 09:00 AM | 60 mins | 🗑️ |
| Family Planning 30min            | 09:00 AM - 10:00 AM | 60 mins | 🗑️ |
| Family Planning NP               | 10:00 AM - 11:00 AM | 60 mins | 🗑️ |
| Family Planning Follow Up Visits | 11:00 AM - 11:30 AM | 30 mins | 🗑️ |

## Reducing No-Shows

Missed appointments can cost a medical practice a significant amount of money. Keeping a full schedule and reducing no-shows can help a clinic maximize its revenue.

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# Reducing No-Shows

## Where are Text Message Reminders Setup?

- Settings
- Practice
- My Practice Settings
- Device Integration

The screenshot displays the 'Settings - Device Integration' page. The left sidebar contains a navigation menu with the following items: Practice (2), My Practice Settings (3), Audit Trail, Billing, Care Programs, Clean Claim Checks, CureBilling, CureConfirm, Custom Apps, Dental Care, Device Integration (4), EDI, EHR, Inventory, KIOSK, Leap, Problem List, Reports, Scheduler, Secure Video, SMART Apps, Security, Single Sign-On Configurations, Agency, Appointment Reason, Appt Reason Group, Bank, eSuperBill, and Financial Aging. The main content area is titled 'Text Message (TM) Alerts, Notification and Reminders'. It includes checkboxes for 'Enable SMS Alerts', 'Enable Short Code', 'Send SMS from Scheduler', 'Enable Alerts For All Patients', and 'Disable Alerts For All Patients'. Below these are columns for 'Alert Type', 'Short Code Template', 'Triggers', and 'Custom Template'. The 'Alert Type' column lists: Scheduled Appointment, Confirmed Appointment, Follow Up Visit Alerts, Administrative Alerts, Clinical Reminders, Lab Result Notifications, Birthday Greetings, and Patient Search Report. The 'Triggers' column shows '2 days before' for most alerts and 'New SB' for Patient Search Report. The 'Custom Template' column contains several text message templates, such as 'Dear «Patient First Name», You have an appointment with with Dr.«Appointment Provider First Name» «Appointment Provider Last Name» on «Appointment Date and Time». Please call «Current Practice Phone» to confirm/change' and 'Dear «Patient First Name», Your labs have been received by Dr.«Patient Provider First Name» «Patient Provider Last Name». Please visit «Current Practice Name» for details.' At the bottom, there are 'Text Messages(TM) Schedule Settings' including a time range (01:00 AM to 08:00 PM) and a 30-minute interval, with checkboxes for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun).

# Reducing No Shows

## Strategies to Minimize No-Shows:

### Implementing reminder systems (SMS, email)

- To reduce missed appointments, text messaging can use automated reminders that include personalized messages with appointment details.

The screenshot shows a software interface for configuring text message alerts and reminders. The interface is divided into several sections:

- Search:** A search bar at the top left.
- Navigation:** A sidebar on the left with icons for various practice settings and a gear icon for configuration.
- Text Message (TM) Alerts, Notification and Reminders:** The main configuration area, which includes:
  - Enable SMS Alerts:** A checked checkbox.
  - Enable Short Code:** A checked checkbox.
  - Send SMS from Scheduler:** An unchecked checkbox.
  - Enable Alerts For All Patients:** A link.
  - Disable Alerts For All Patients:** A link.
  - Alert Type:** A list of alert types with checkboxes: Scheduled Appointment, Confirmed Appointment, Follow Up Visit Alerts, Administrative Alerts, Clinical Reminders, Lab Result Notifications, Birthday Greetings, and Patient Search Report.
  - Short Code Template:** A dropdown menu for each alert type, currently set to "New SB".
  - Triggers:** A dropdown menu for each alert type, currently set to "2 days before".
  - Custom Template:** A text area for each alert type containing personalized messages with placeholders like «Patient First Name», «Appointment Date and Time», and «Current Practice Phone».
  - Text Messages(TM) Schedule Settings:** A section at the bottom with a time range (01:00 AM to 08:00 PM) and a frequency (After 30 mins), and checkboxes for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun).





# Reducing No Shows

## Tools and Techniques:

- Automated reminders and confirmations (Text Alerts under patient preferences)
- Offer patients the option to choose their preferred channel for receiving reminders, such as email, text message, or phone call.

The screenshot shows a patient preferences form with the following sections:

- Demographics**: Preferred Address (Current Address), Block Appointment (--Reason--), Family Members, House Income, Rx History Consent Obtained, Text Message Consent Obtained.
- Release of Information**: Release of Information Signed, Signature on File, Decline Clinical Reminders.
- Communication Preference**: Letter (dropdown).
- Clinical Summaries via**: Print (selected), Fax, Email, Patient Portal, None.
- Special Population**: Agriculture Worker, Migrant, Seasonal, School Based Health Center Patient, Veteran, Refugee.
- Residence**: Homeless, Type (--Select--), Public Housing, Nursing Home, Jail, Prison.
- Pharmacy**: Address, Phone, Fax, SureScripts, Default.
- Laboratory**: --Laboratory-- (dropdown).
- Radiology**: --Radiology-- (dropdown).
- Reports**: Discontinue Statement (Confidential), Exempt from reporting (Medical), Exempt from HIS batch reports, Exempt from HIE Reporting.
- Alerts**: A table with columns for Alerts, Text, Email, and Phone.

A green callout bubble points to the 'Reports' section with the text: "Patient Text alerts will be managed individually by choosing the options".

| Alerts   | Text                                | Email                    | Phone                    |
|--|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> All                    | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> Scheduled Appointment  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> Confirmed Appointment  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> Follow Up Visit Alerts | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> Administrative Alerts  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> Clinical Reminders     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

# Improving Patient Flow






# Improving Patient Flow Utilizing Today's Patient's

## What Makes Today's Patients Important for Patient Flow!

- Works as a Status Board to Track Patients in the clinic
- Statuses are Customizable/**Color-Coded**
- Wait Time is Calculated to Help with Reporting to Create Clinic Efficiencies!
- Cycle Time Reporting!





# Maintaining a More Efficient and Organized Practice





## Maintaining a More Efficient and Organized Practice

### **Optimizing Patient Flow**

- Managing peak times and high-demand periods
- Utilizing data to predict and plan for busy times

### **Streamlining Processes**

- Efficient check-in and check-out procedures
- Integrating patient flow with other practice management functions

### **Tips for Ongoing Efficiency**

- Regular review and adjustment of scheduling practices
- Training staff on effective scheduling techniques

Thank you.

